

## Dashboard provider webinar Q&As

**18 and 21 October 2021**

**1. Can you clarify if dashboard providers will provide data via APIs or a full website?**

A dashboard can be an existing pension dashboard, a mobile app, single page application etc. It is expected it will have user authentication, however this isn't strictly necessary (the architecture can manage authentication). The pension data, once found, is presented from pension providers via an API. As mentioned in the video, no data is held at any point, it is all via APIs.

**2. Could a provider just offer an API service that could then be used by other apps? I am thinking of a model similar to open banking**

Yes, they could, in order to do that they would have to connect via an authorised party.

**3. If an organisation decides to not participate in Alpha phase will there be any time restrictions in becoming a Dashboard Provider at a later date?**

No. Beyond us having to manage resource (dependent on number of dashboards trying to onboard at a moment in time), there will not be a restriction in joining later. There will be opportunities for other participants to join after the Alpha phase. If selected for Alpha, it doesn't guarantee a spot in Beta. We will be developing criteria for Beta participation over the next few months and during Alpha.

**4. Sorry, is there a time constraint on applying to be an authorised party?**

Not to my knowledge

**5. At what point will real customers be seeing data? Is that in Beta?**

Yes

**6. Will Alpha be testing what customers see on screen? i.e. layout etc?**

Yes and whether the dummy data is sent through API correctly. Focus is on what customers see on screen and how they respond to the layout and information they see. Any information we gain in Alpha will feed into design standards and guidance that the programme will develop.

**7. Could you be accepted for Beta having not participated in Alpha?**

Yes. Alpha and Beta are programme phases for the architecture. Onboarding of dashboard and data providers will be an ongoing process from Beta onwards.

**8. Are there any restrictions on what other value-added services may be offered by a provider over and above the facilities already described?**

The standards and guidance will apply to what and how data is displayed to the user, and that personal data is not stored within the dashboard. We do not anticipate any restrictions on other value-added services delivered outside of the dashboard ecosystem.

**9. At what point will participants be expected to have an operational dashboard?**

That will be once we start private Beta but there is not hard and fast deadline for an organisation to be ready with an operational dashboard. When an organisation is ready and satisfy the criteria to become a dashboard provider, they can request to onboard on to the central architecture.

**10. How many candidates are you looking for in the Alpha Stage?**

2- 3 commercial providers, to help us to develop the design standards and guidance, support development of regulatory process for this activity and the onboarding process.

**11. What approval process will dashboard providers have to go through for onboarding? Apart from FCA, will there be a kitemark accreditation stamp for providers?**

Yes, there will be the FCA process which will be created over 2022, we haven't yet created another kitemark. The design standards which will be developed during Alpha, will be a requirement for dashboard providers. Other aspects like a kitemark accreditation stamp may also be considered as part of the Alpha work and discussions with FCA.

**12. In terms of the Find process it is direct with the ecosystem. However, with the View process it is direct with all dashboard providers. Why does it not just continue the one to one direct exchange with the ecosystem as it requires all providers to interact with all dashboard providers?**

It is only direct with those data providers who have found pensions, the find will go out to in excess of 40,000 schemes.

**13. So will the alpha phase work be regularly shared with dashboard providers who are not Alpha participants?**

That is our aim.

**14. Can you use PEI outside of dashboard?**

No reason why you can't, however, the dashboard would not be involved in resolution of end points outside the dashboard.

**15. What stage is the development of the identity service?**

We are not developing identity we are procuring a single identity service for the to support the ecosystem during Alpha and early stages of Beta.

**16. Are you interested in testing different channels for the dashboard provision - web/app?**

During alpha, probably not but as we continue we will look at that in more detail.

**17. No call for data providers during the alpha phase while dummy data is used if I understood - when are data providers involved called upon to influence the design etc...?**

Data providers are already involved in influencing the design of the onboarding process. We are working with 7 data providers using dummy data to start with.

**18. Who (and how) do I contact to become involved in the mentioned technical working group?**

Please contact PDP events: [eventsdpdp@maps.org.uk](mailto:eventsdpdp@maps.org.uk)

**19. I may be able to find this on the website but could you share when you hope to complete the Alpha and Beta Stages and what is your estimated 'go live' date**

Alpha stage ends in May 2022. First phase of private Beta will start in June and take us up to the end of March 2023. Then into the 2nd stage of private Beta.

**20. Will dashboard providers also be expected to undertake user research or are PDP responsible solely for this?**

As a potential dashboard provider you may want to undertake your own user research to ensure the product you develop is user friendly. We are undertaking user research to support the develop the design standards and guidance and will be sharing summarised findings on an ongoing basis.